

Group-Mail Manual

USING GROUP-MAIL



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Step 1: Installing the software

Once you have downloaded GroupMail 5.0 you just need to double click on the downloaded file from Explorer to start the installation process. Alternatively if you are using Internet Explorer or similar you may be prompted to open the file once the download is complete. This option is also acceptable. If you have an existing copy of GroupMail running then you should close it down before starting the installation.

When you open the installation file you will be presented with the product installer:

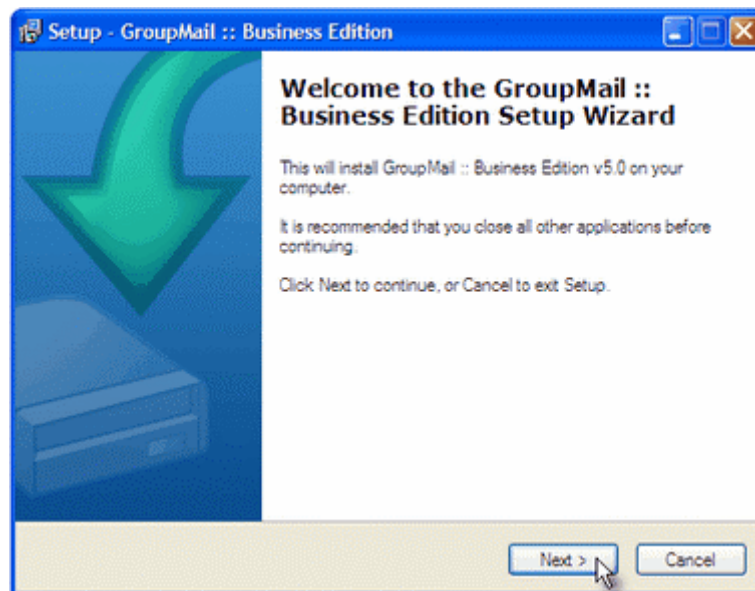


Figure 1

When this appears you should click 'Next' button. This will bring you to the License Agreement which you should read carefully. When you are satisfied with it you should click on the 'I accept the agreement' radio button (as below)



Figure 2

And then click 'Next'. At this stage you can review the Readme information file which shows you what changes etc. have been made in this version of the software. Click 'Next' to continue to choose the installation folder.

The installer at this stage will check to see if GroupMail 5 has been installed previously. If it has it will select the existing GroupMail folder to install to. If GroupMail wasn't installed previously a default option will be chosen. It is recommended that you accept this choice but you can change this to any other location that suits you. Once you are satisfied that the software will be installed to a suitable place please click 'Next' to proceed to the 'Select Components' part.

The GroupMail installation is made up a few component parts. At present these are:

- GroupMail: This is comprised of the core application files and is always installed.
- Add-ons: These are extra pieces of software that provide additional integrated functionality to you such as Subscription Management (via the Subscriber Add-on) or Email Address validation (via the Email Inspector Add-on).
- Templates: GroupMail comes with a set of designer templates that you can use for creating new messages.
- Outlook Toolbar: If you use Microsoft Outlook 2002 or higher then you can choose to install this option. The Outlook Toolbar integrates some GroupMail features directly into your Outlook Client. If you choose this option please make sure that you close the Outlook client before proceeding. Otherwise you may need to restart your system in order to complete the installation.

When you have selected the items you wish to install you should click the 'Next' button. Now you can select the name for the folder to store the Start Menu shortcuts. We recommend that you use the default option here. Click 'Next' to create additional icons.

Click 'Next' again to review all of the installation options. If you are happy with these settings click on the 'Install' button. Otherwise click on the 'Back' button and make any required changes.

When all the required files are installed you may be asked to Restart your system. If this is the case you should otherwise the software may not function correctly.

When the installation has completed successfully you will be presented with the following screen:

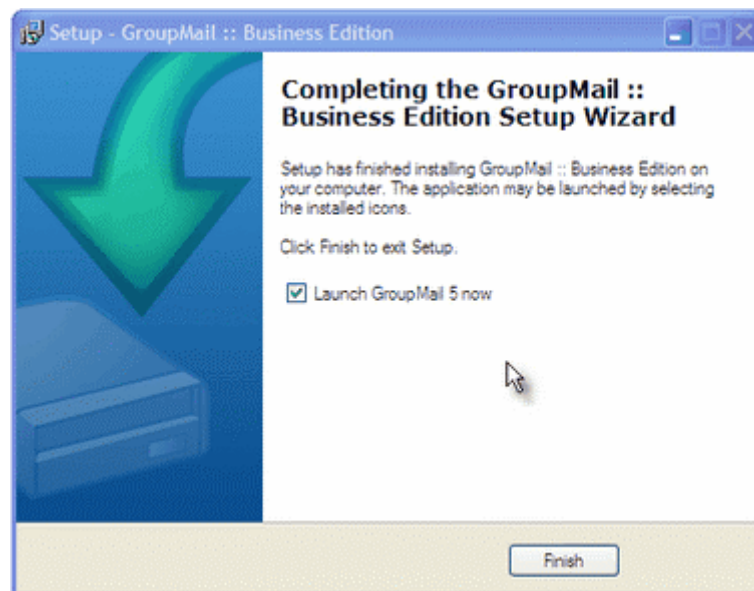


Figure 3

By default the Launch GroupMail 5 now check box is enabled. With this set GroupMail will start up automatically when you click on the 'Finish' button.

Step 2: Starting GroupMail 5

To start the software regularly (as in not from the installer) click on the Start Menu, All Programs and GroupMail 5 folder

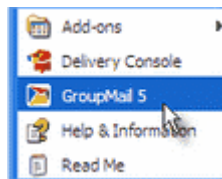


Figure 4

Click on the GroupMail 5 icon and this will start GroupMail.

If it is your first time to use GroupMail you will be presented with the Getting Started helper:



Figure 5

This will guide you through the steps required to get the software running. For the sake of this article we are going to assume that you didn't complete this wizard. (Please note that this helper is available at anytime from the Help menu).

Step 3: Configuring GroupMail

GroupMail is designed to send messages to groups of recipients. In order to use GroupMail you will need to configure 3 basic things.

How to Send - (i.e. - Account Settings)
Who to Send to - (i.e. - Groups/Recipients)
and What to send - (i.e. - Messages)

There are lots of other options available but these three are essential if you are to use GroupMail successfully.

Step 4: Setting up your Account details

By Account details we mean the details required to send your messages and identify the sender. This resembles the typical Email Account settings dialog present in most email clients. To create an Account you need to go to the Account Manager. You can do this via the Home screen or Tools menu.

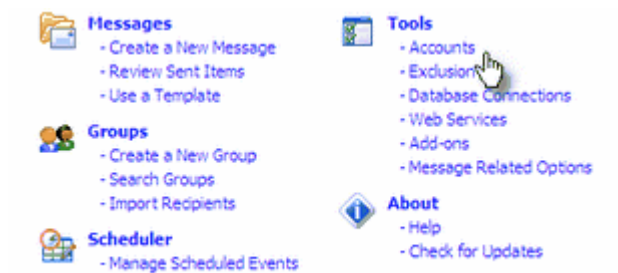


Figure 6

This picture shows you how to get to the Account Manager from the Home screen.

This is what you will be presented with when you click on Accounts (or Account Manager on the Tools menu).

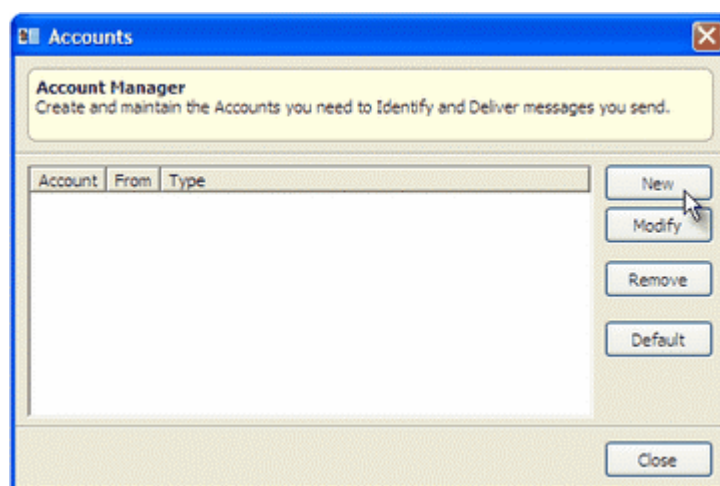


Figure 7

To create a new account click on the 'New' button.

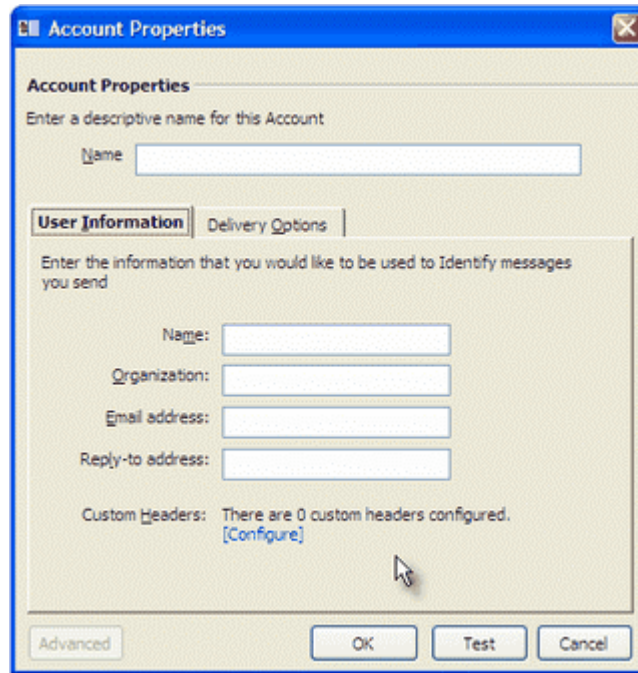


Figure 8

An Account is made up of 3 parts.

A Descriptive Unique Name - this is how you will recognize the Account later when you are sending a message.

User Information - this describes the Sender (Name, Email Address etc.)

Delivery Options - this determines how messages sent using this account will be delivered.

Fill in the User Information with the details you would like to use to identify each message sent (this information will appear in the 'From' header in each message sent).

Click on the Delivery Options tab now to enter in the settings used to deliver the actual message.

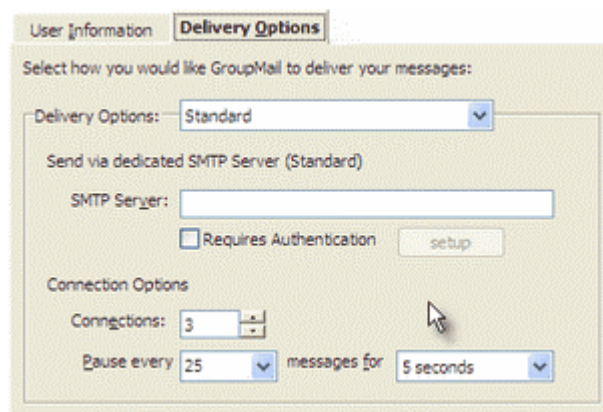


Figure 9

There are 4 different ways to get GroupMail to deliver your messages (see the Delivery Options drop down list above):

- Standard - this sends the messages through your corporate SMTP Email Server and it is typically the option we would recommend to most users.
- Direct - this sends the messages directly from your system to each of your recipients. This option works well for users who already run their own mail server or have a fixed IP address with a reverse DNS entry. For most dialup users we would not recommend this option as it can be considerably slower to send with.
- Outlook - if you are using the Microsoft Outlook client for your email then by using this option GroupMail will route all your email through Outlook. This is useful if you are using Microsoft Exchange with no SMTP support enabled.
- Pickup - this option is useful for those running GroupMail on a system which is running an SMTP delivery service (like the one included with IIS or Quiksoft's SMTP Express).

Fill in the User Information with the details you would like to use to identify each message sent (this information will appear in the 'From' header in each message sent).

For this article we are going to configure the most common option - Standard. For this we will need to know the address of the SMTP Server we are going to delivery though, and if we need Authentication or now. Your web-hosting provider can provide you with all of this information (they may even have articles on their website - check out their support section).

Let's imagine that we've been in touch with our web-hosting provider and they have provided us with the following information:

SMTP Server address is 'mail.webhostprovider.com'

SMTP Authentication is required. Use your our web-hosting provider email address 'myname@webhostprovider.com' and the password you use to check that account.

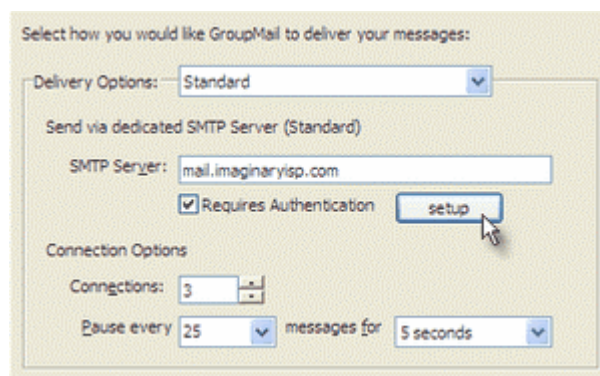
The image shows a screenshot of a web-based configuration window titled "Select how you would like GroupMail to deliver your messages:". The "Delivery Options:" dropdown menu is set to "Standard". Below this, the text "Send via dedicated SMTP Server (Standard)" is displayed. The "SMTP Server:" field contains the text "mail.imaginaryisp.com". A checkbox labeled "Requires Authentication" is checked. To the right of this checkbox is a "setup" button, which a mouse cursor is pointing at. Below the SMTP section, the "Connection Options" section is visible. It includes a "Connections:" field with the value "3" and a "Pause every" field with the value "25" messages for "5 seconds".

Figure 10

Enter this information (as above). For the mean time you can ignore the 'Connection options' (refer to the User Manual for more information on them).

To enter the Authentication information click on the Setup button under where you have entered the SMTP Server address

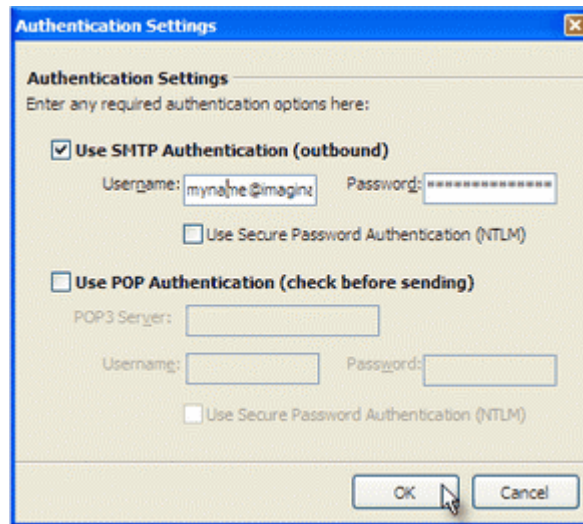


Figure 11

Check the Use SMTP Authentication (outbound) and enter the username and password you were given by your web-hosting provider. Click OK to store this information.

To make sure your settings are correct and working click on the Test button on the Account Properties screen.

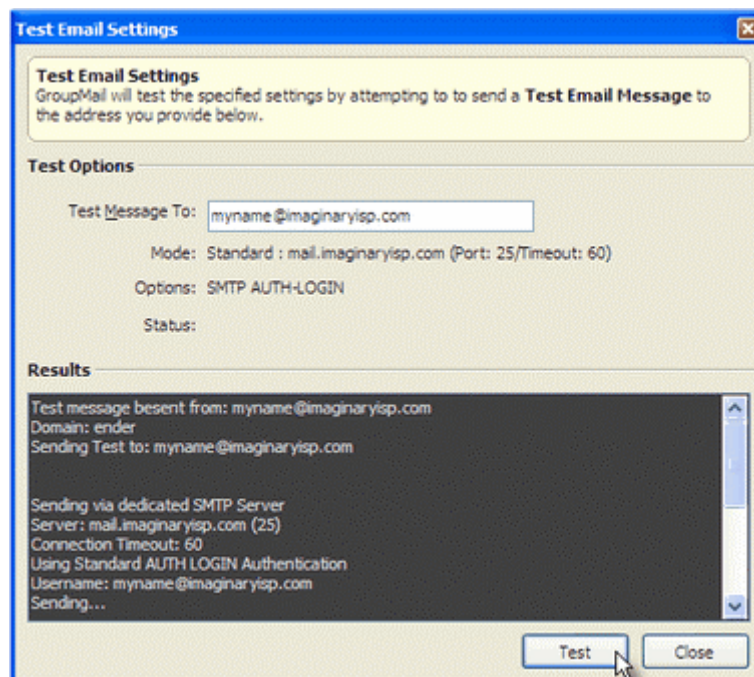


Figure 12

If you are having any problems make sure that your Firewall is configured to let GroupMail send. If problems persist double check your settings, check with your web-hosting provider and if you are still having problems contact GroupMail Support.

When you are happy with your 'Account Settings' click OK. On the Account Manager screen you can create as many accounts as you like. This is useful if you wish to send different types of messages to different groups of recipients (Personal and Business for instance) or if you require different delivery options based on location.

Close the Account Manager when you are ready and return to GroupMail. Now we are ready to create a group.

Step 5: Creating a Group

A group is essentially a list of recipients who you want to send messages to. To create a group you need to go to the Groups area.

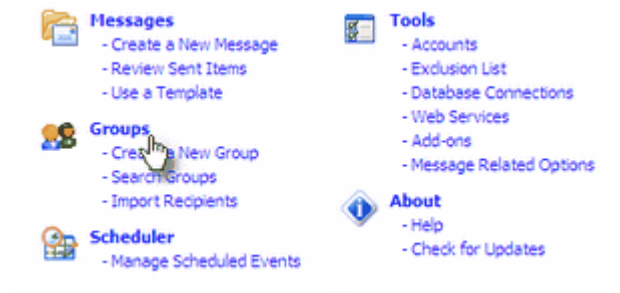


Figure 13

Click on the large Groups icon in the Toolbar or click on the Groups link on the Home page (as above). To create a new Group click on the Create New Group item on the Action Menu or on the Task Pane on the left hand side of the screen.

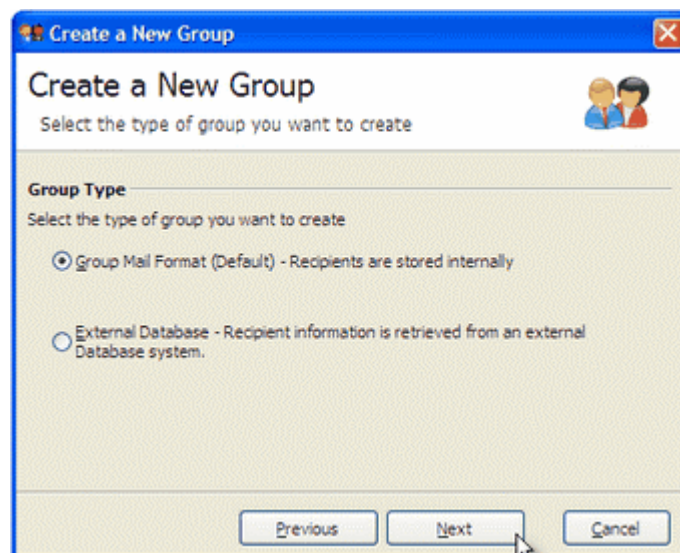


Figure 14

This will start the 'Create a New Group' wizard. For the purpose of this article we will choose to create a GroupMail Format (default) group. If you already have all your recipients in a database like SQL Server option then you could choose to link to it. To do this you would use the External Database option.

With the GroupMail format option selected click next to proceed.

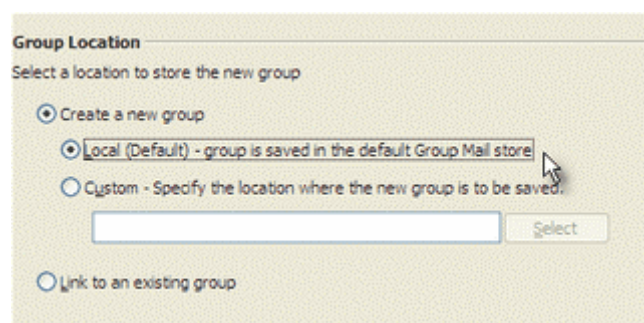
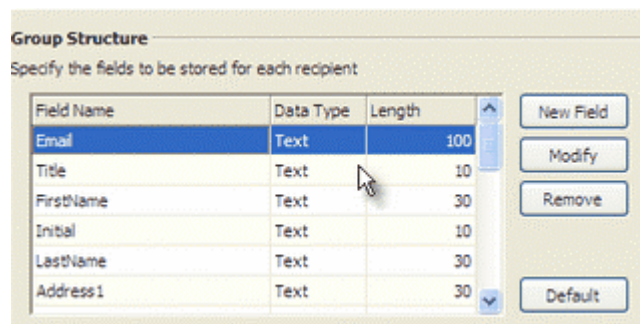


Figure 15

It is possible to create Groups that can be shared with other users. To do this you would click on the Custom item (above) and select where to store the Group (for instance you might like to save it on a Network Share or File Server where others can access it). If you wish to use a Group that somebody else has created then you would use the 'Link to an existing group' option. These options are explained in more detail in the User Manual.

For this article we will use the default option: 'Local - group is saved in the default GroupMail store'. Select this and click 'Next'.

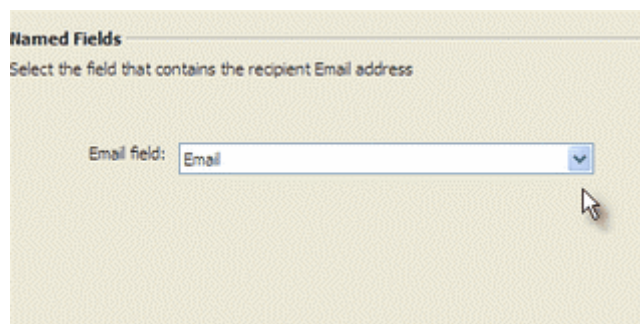


The 'Group Structure' dialog box is shown. It has a title bar 'Group Structure' and a subtitle 'Specify the fields to be stored for each recipient'. It contains a table with three columns: 'Field Name', 'Data Type', and 'Length'. The table lists several fields: 'Email' (Text, 100), 'Title' (Text, 10), 'FirstName' (Text, 30), 'Initial' (Text, 10), 'LastName' (Text, 30), and 'Address1' (Text, 30). To the right of the table are four buttons: 'New Field', 'Modify', 'Remove', and 'Default'. A mouse cursor is pointing at the 'Email' row in the table.

Field Name	Data Type	Length
Email	Text	100
Title	Text	10
FirstName	Text	30
Initial	Text	10
LastName	Text	30
Address1	Text	30

Figure 16

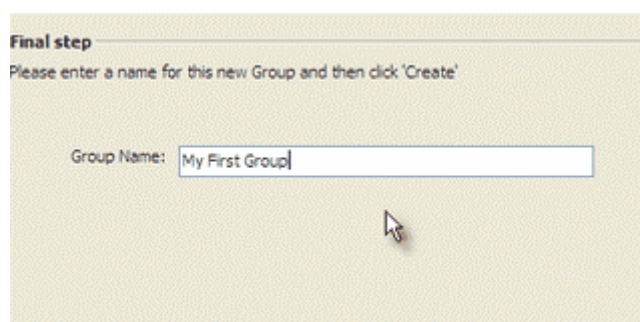
Now you can setup how the group will be comprised. There is a default list of fields available but you can remove or alter these. Ideally you should only have the fields you will use listed in order to save space and make the groups as quick as possible to work with. Click 'Next' when you are happy with the fields that will make up the group.



The 'Named Fields' dialog box is shown. It has a title bar 'Named Fields' and a subtitle 'Select the field that contains the recipient Email address'. It contains a label 'Email field:' followed by a dropdown menu. The dropdown menu is currently set to 'Email'. A mouse cursor is pointing at the dropdown arrow.

Figure 17

Because you can setup a group anyway you like GroupMail needs to know which field will contain the email address for each record or recipient in the Group. Select the appropriate field and click 'Next'



The 'Final step' dialog box is shown. It has a title bar 'Final step' and a subtitle 'Please enter a name for this new Group and then click 'Create''. It contains a label 'Group Name:' followed by a text input field. The text input field contains the text 'My First Group'. A mouse cursor is pointing at the text input field.

Figure 18

Enter a unique and descriptive name for the Group now and then click on the 'Create' button. Congratulations! You have successfully created your first Group. Now it's time to add some recipients to it.

In the Groups area in GroupMail you should select the Group you have just created. You can add recipients one at a time to this by right clicking on the Group and selecting the Add Recipient to Group menu item.

Field name	Value
Email	john.doe@imaginaryisp.com
Title	Mr.
Firstname	John
Initial	
Lastname	Doe
Address1	1231 Imaginary Place
Address2	Apt 4.
City	Sligo
State	IE
Zip	

Figure 19

Enter in the desired details for the Recipient and click on the 'OK' button. Repeat this as necessary.

If you have all of your recipients in an existing list you can add them to your groups much faster by using the Import options:

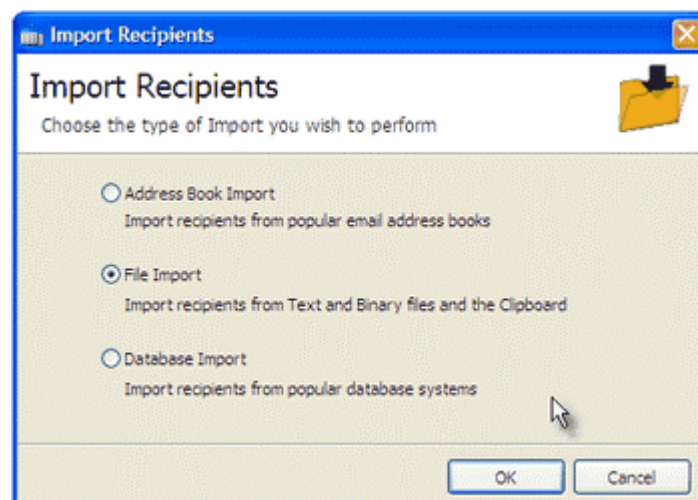


Figure 20

Importing is beyond the scope of this article but is well documented in the Help file, User Manual and Articles.

Now you have a Group set-up with some Recipients in it. Next all you need is a message to send.

Step 6: Creating a Message

To create a message in GroupMail you can click on the File Menu and choose the New Message option - or you can click F2. This will start the GroupMail Editor

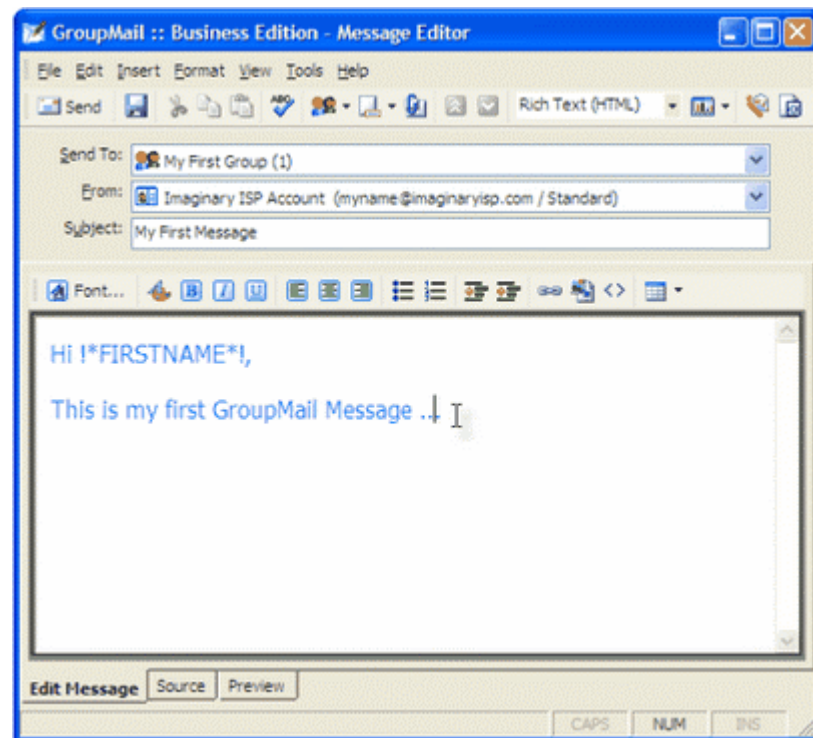


Figure 21

The GroupMail Message Editor resembles most other email editors except that instead of typing in the Email Address to send to you choose a Group of recipients (see Send To above). To show who the message is From choose an Account from the From list. This will also determine how the message will be sent. Type in a Subject and Message.

By default all messages created by the Editor are HTML. If you wish to change this go to the Format menu or just click on the Message Format drop down list as shown:



Figure 22

To personalize a message you should click on the Insert Menu and click on the Merge Fields item. For more advanced personalization you can use Merge Scripts.

Use the Insert menu to embed images, hyperlinks or add attachments to your message as required.

When you are happy with the content of your message you should Preview it to see how it will look when you send it. To do this click on the Preview tab available at the bottom of the message editor:

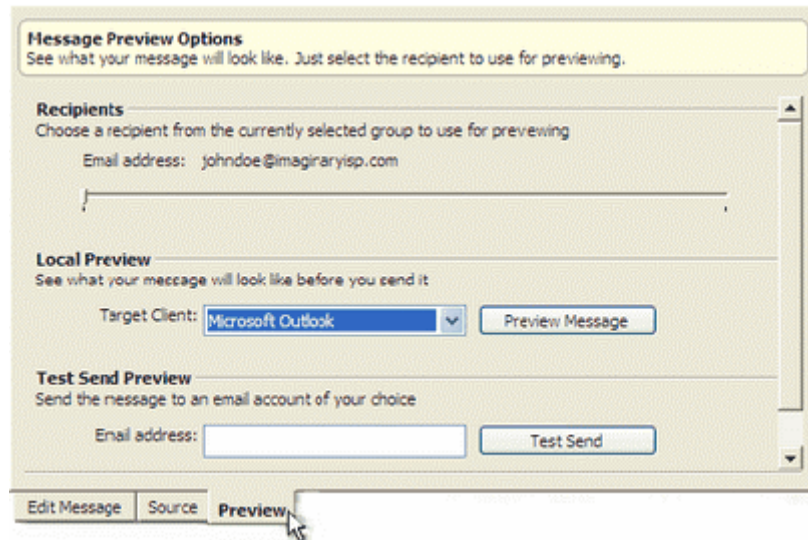


Figure 23

Using the Local Preview option and select the installed email client that you would like to use to preview the message. Then click on Preview Message. This will 'Personalize' the message and open it in your regular Email software showing you how your message will look. If you want to carry out further testing you can use the Test Send Preview option - just enter the email address you would like to send the message to and click Test Send. This is an ideal way to test how a message will look in a Web Mail client like Hotmail.

Once you have reviewed your message you should save it. To do this click on the File Menu and choose Save. The message will now be saved as a Draft and will be available from GroupMail at any time via the Messages/Drafts area.

Step 7: Sending a Message

With the message saved you are now ready to send it. To do this click on the Send button in the Toolbar or the Send item on the File menu. This will bring up the Prepare to Send dialog which allows you to set some additional delivery related options

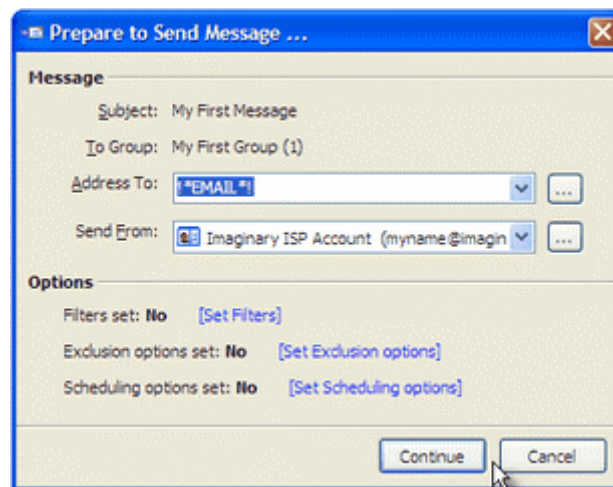


Figure 24

On this screen you can review that you are sending to the correct group. If you are not you should cancel and return to the message editor and select a different group. Then repeat the send process.

The Address To list on this screen allows you to determine what text will appear in the “To” header in the messages you send and if they will be Personalized. By default the recipients email address will be shown here. You can select any fields you like here from the list though (or any combination of them. If you wish to send the message in bulk mode then you should click on the button beside this option and select the Bulk Address type.

Check that the Account listed in Send From is the correct one. You can make changes to it here by clicking on the button beside it.

In the options area you can set filters, which will allow you to control who gets messages using the contents of specific fields. With Exclusion options can you do partial mailings to part of a group, and block recipients from being sent messages if they exist in other groups and or files. Scheduling Options allows you to set a time or date in the future that the message should be sent. For more information on these options you should refer to the Help file or User manual.

To Send the message (or queue it if it is scheduled) click on the Continue button.

GroupMail will now start the Delivery Console. This is a separate piece of software which is used to manage the delivery of your GroupMail messages.

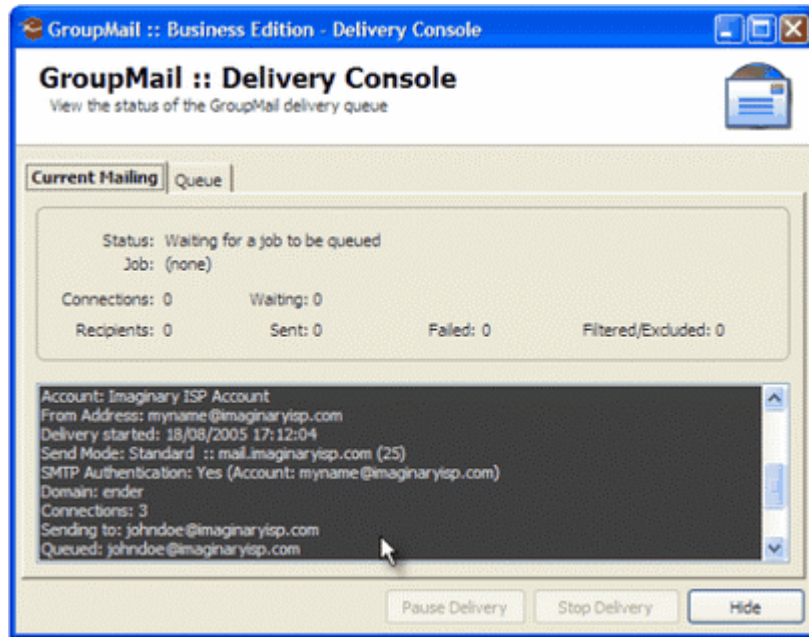


Figure 25

When the Delivery Console is running there will be an Envelop icon in the system tray like this:



Figure 26

If you need to access the delivery console at any time just double click on this envelop or alternatively click on the Delivery Console icon on the Main Toolbar in GroupMail.

The Delivery Console manages all queued messages in GroupMail. If you wish to see how a previous message was handled then you should go to the Sent Messages area in GroupMail on the Messages Screen. Here you can choose a previously sent message and view the logs on it. You can also resend it or resume it if the mailing was incomplete.

To Recap: In GroupMail there are 3 essential things that you need to do in order to be able to use it.

1. Create an account with all the identification and send details required.
2. Create a group and add recipients to it.
3. Create and send a message.

Everything else in GroupMail fits around these main items and we invite you to review the User Manual which is freely available with the software for further information.

This guide is intended as a quick start guide. If you require further information or guidance on any of the topics discussed please refer to the help file, the user manual or GroupMail support.

This guide is based on the complete Business Edition of GroupMail.